MaintSmart
CMMS with Reliability Analysis

MaintSmart

CMMS Software

version 4.0

Work Order and PMs *Quick* Start Tour

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Get the **MaintSmart CMMS Software User Manual** (197 pages) as Adobe:
http://www.maintsmart.com/MaintSmart_User_Guide.pdf

Get the **MaintSmart CMMS Software Purchasing/Inventory Manual**
http://www.maintsmart.com/Support/MaintSmart3EPurchasingUserGuide.pdf

Have a Question? Pick Up the phone and call toll-free: 1-888-398-0450 or 1-541-751-0450 or email us at sales@maintsmart.com Skype ID 'maintsmart'

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How to Use the Quick Start Tour

Quick start is designed to give you a quick overview of a couple of MaintSmart's powerful features. Quick start only small percentage of MaintSmart's basic features. Procedures that are covered are not covered in detail; however you are encouraged to explore each screen further. It's recommended that you also download the MaintSmart User Guide. The User Guide covers all topics of MaintSmart in detail and provides a handy reference if you need to explore MaintSmart's features in depth.

Important: The sample data contained in the Demo is for a manufacturing facility. However MaintSmart works great for building, fleets, schools, hospitals, etc. Top level entity: "Plant" may be easily changed to "Building", "School", "Fleet" etc.

How to Use the Quick-Start Tour:
This tutorial assumes you have already entered basic configuration data into MaintSmart or are using one of the "demo" databases provided with MaintSmart. For the purposes of this tutorial we'll use the manufacturing demo database. For information on configuring MaintSmart please see the full User Manual. The MaintSmart Demo is the full MaintSmart program with a 30 day limit. This time may be extended once if needed. The Demo contains three databases: Manufacturing Data, Building Data and a blank database that you may configure with your own data. If you decide to use the blank database you can simply email the System ID as displayed under: **Help>>About>>License>>Register** along with a P.O. number or call in a credit card and we'll issue an immediate extension of the license.

Other resources are available too such as: web help, online tutorials, MaintSmart Help (menu items: **Help>>Contents**) and status bar help (set screen focus on many screen items by tabbing to the item with the <TAB> key. For the purposes of this Quick-Start Tour topics or concepts of special importance are in green text. Warnings are presented in red text. Items of emphasis are underlined **Screen labels are in bold type**. The MaintSmart User Guide contains additional details and information on using MaintSmart. It is available for free from our web site: http://www.maintsmart.com

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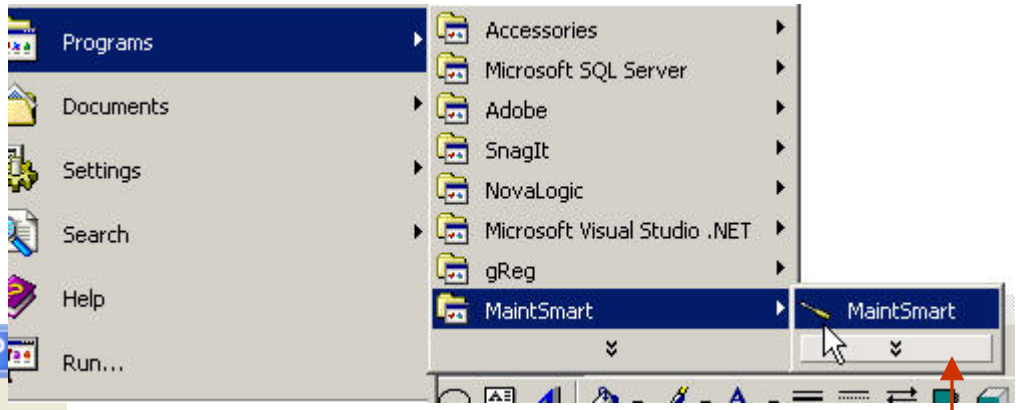
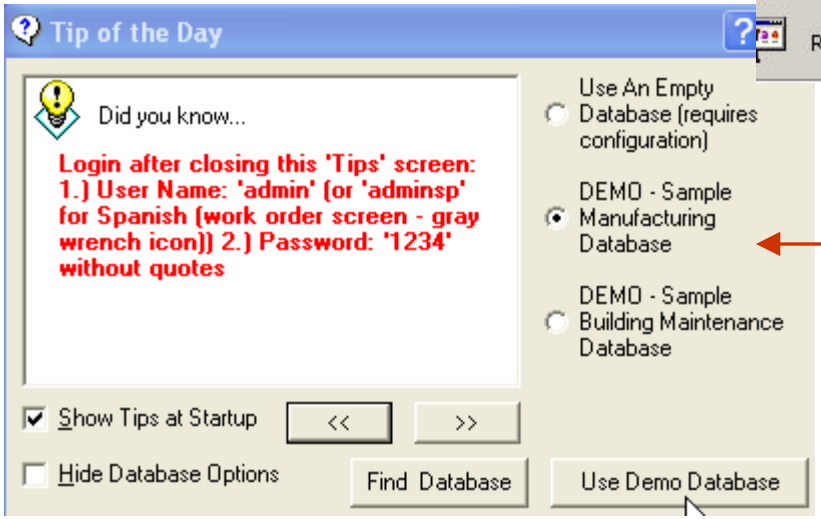
Log On to MaintSmart




Tip of the Day
Did you know...
Login after closing this 'Tips' screen: 1.) User Name: 'admin' (or 'adminsp' for Spanish (work order screen - gray wrench icon)) 2.) Password: '1234' without quotes
Use An Empty Database (requires configuration)
DEMO - Sample Manufacturing Database
DEMO - Sample Building Maintenance Database
Show Tips at Startup
<<
>>
Hide Database Options
Find Database
Use Demo Database

Step 1: Start MaintSmart from **Windows>>Start>>Programs>>MaintSmart**. (or **MaintSmart Enterprise** When MaintSmart starts you'll be presented with a "Tips" screen. Select either Manufacturing Demo, Building Demo or Empty database. For the purposes of this tutorial we'll use the Manufacturing Demo database.

Step 2: For the sample databases the login is entered for you by default: When MaintSmart CMMS Software starts you'll be presented with a log in input screen. Select a "Plant" (or "Building") Enter **admin** for the user ID and **1234** for the password.

Note: the trial version has the "Unsecured All Screens" setting turned on in the Program Configuration section of the program to make it simple to test MaintSmart CMMS Software. You may create your own user groups/passwords with this trial version of MaintSmart CMMS Software. This is actually the full MaintSmart CMMS Software program with a 30 day limit.

Spanish Language: To see work order data entry screen (partially translated) in Spanish enter the user name: **adminsp** and the password **1234**. MaintSmart CMMS Software may be translated into most languages. To see this partial translation open the work order data entry screen after logging in.

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Create a Simple Work Order

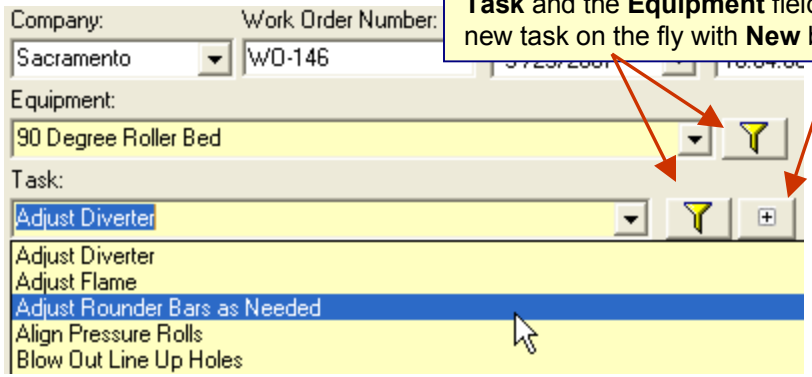
Step 1: Click the wrench icon at the top of the screen to open the work order data entry screen.

Step 2: When the work order screen appears click the **New** button with the left mouse button.

Step 3: Enter a work order number or let MaintSmart CMMS Software enter a work order number or auto-increment for you automatically (see menu items: **Options>>Work Order Numbering>>?).** Next select an equipment item from the drop-down. Filter the equipment drop-down if needed by clicking the **Filter** button. Select a task from the **Task** drop-down.

Note: selecting an equipment item automatically populates **Department** and **Work Area/Location**. This is the default action but may be easily changed from the menu items **Options>>Defaults>>Equipment Drop-Down**.

Use the **Filter** button (optional) to limit the selections in the drop-down box on the **Task** and the **Equipment** fields. Create a new task on the fly with **New** button.



Step 4: Press the **Save** button. That's it you're done!

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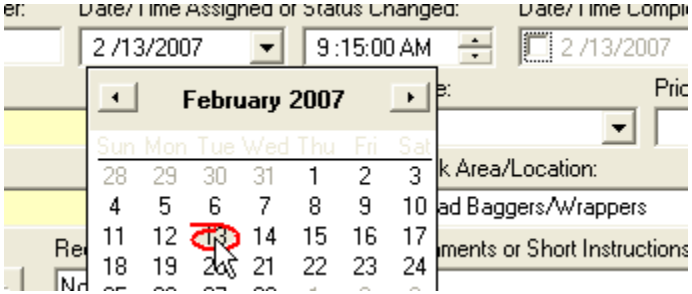
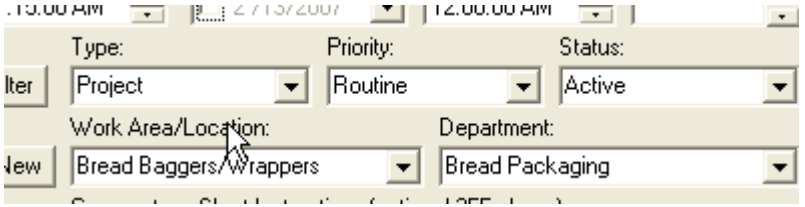
Create a Detailed Work Order (optional)

Step 1: Follow steps 1-3 on the previous page to begin creating a new work order.

Step 2: Select the date/time the work order is created. MaintSmart CMMS Software uses today's date by default but this may be changed by clicking the down arrow on the date box.


2 /13/2007
9 :15:00 AM
2 /13/2007
February 2007
Sun Mon Tue Wed Thu Fri Sat
28 29 30 31 1 2 3
4 5 6 7 8 9 10
11 12 13 14 15 16 17
18 19 20 21 22 23 24
k Area/Location:
ad Baggers/Wrappers
ments or Short Instructions

Step 3: Select the work order **Type, Priority and Status**. Note: select **New Type…** to create a new work order type (also applies to **Priority** and **Status**).

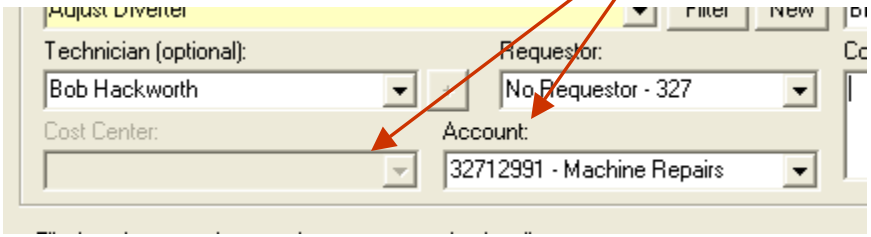


Optionally link work order to Cost Center and/or Account. Either or both of these fields may be forced and locked by Administrator too.

Step 4: Select an maintenance technician for this work order. If this is a work request you may select a **Requestor**. Later in this tutorial we'll show you how to add multiple maintenance technicians to each work order and even have MaintSmart CMMS Software time their work automatically.

Note: the term "Technician", "Department", "Work Area/Location" may all be changed to suit your maintenance operation from the **Program Configuration** screen.

topic continued on next page...



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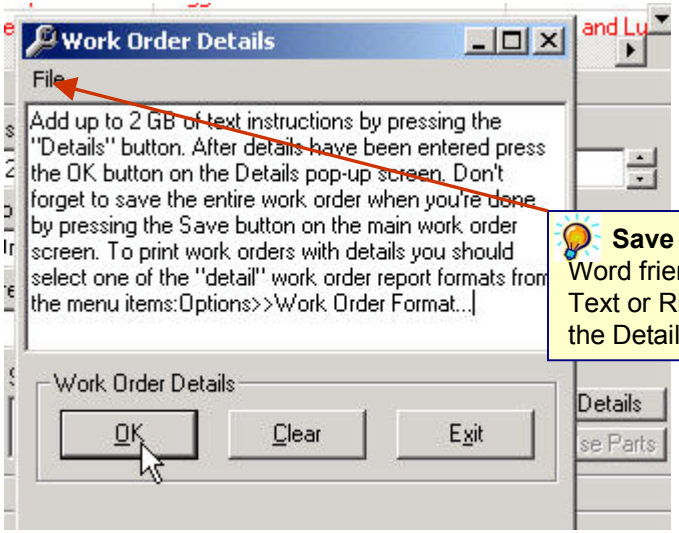
Create a Detailed Work Order (continued)

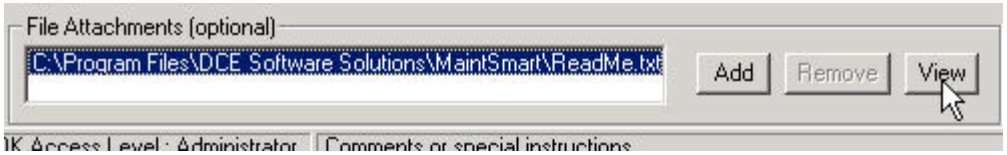
Step 5: Add up to 255 characters of text for a short work order instruction (optional).

Step 6: Add up to 2 GB of text instructions (optional) by pressing the "Details" button. After details have been entered press the OK button on the Details pop-up screen. Don't forget to save the entire work order when you're done by pressing the Save button on the main work order screen. To print work orders with details you should select one of the "detail" work order report formats from the menu items:Options>>Work Order Format...


Work Order Details
File
Add up to 2 GB of text instructions by pressing the "Details" button. After details have been entered press the OK button on the Details pop-up screen. Don't forget to save the entire work order when you're done by pressing the Save button on the main work order screen. To print work orders with details you should select one of the "detail" work order report formats from the menu items:Options>>Work Order Format...
Work Order Details
OK
Clear
Exit
Details

Save details as .rtf (Rich Text is a MS Word friendly format). **Open** MS Word, Text or Rich Text documents directly into the Details screen.

Step 7: Link unlimited files to any work order as needed by pressing the Add button. To view or remove a link to a work order click the file attachment then press **View** or **Remove**.



Step 8: Press the **Save** button. The next couple of pages discuss work order options, saving and printing.

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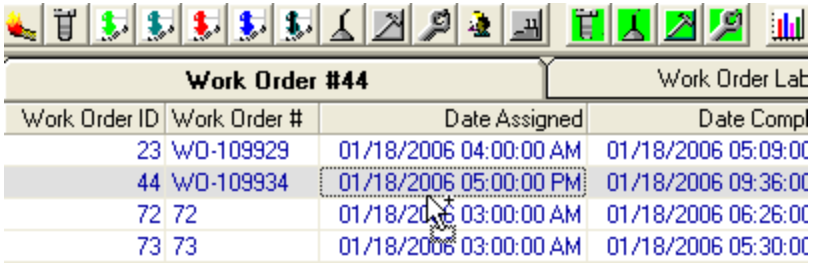
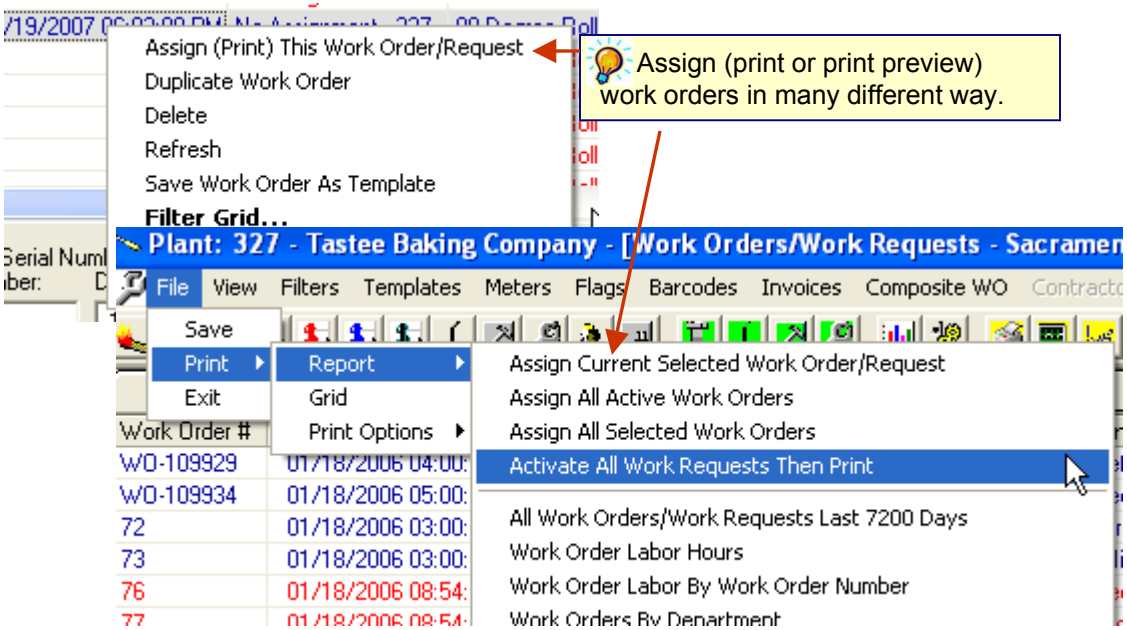
Edit, Delete or Print A Work Order

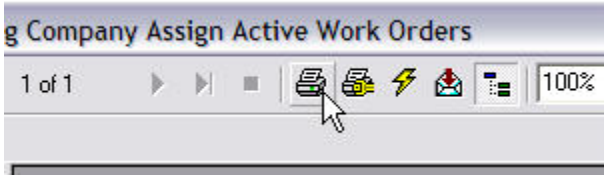
Step 1: From the work order data entry screen left mouse-click the grid row containing the work order you want to edit or delete. Notice that once the work order has been selected that the boxes below the grid become available. Make changes in these boxes then press **Save** to edit this work order. To delete the selected work order click the **Delete** button. Click the **Cancel** button to deselect the work order.



Step 2: There are several ways to print work orders. We'll illustrate one simple way of doing this. Select a work order again by left mouse-clicking the grid row containing the work order. Next right-mouse-click the selected row and select **Assign (print) This Work Order/Request** from the pop-up menu. Work orders may also be printed from the **File>>Print>>??** Menu items as illustrated below.



Step 3: Now that the print preview screen is showing go ahead and print the work order by clicking the print icon at the top of the print preview screen.



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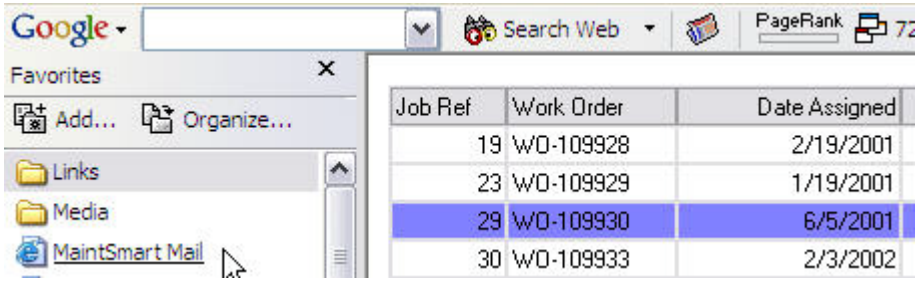
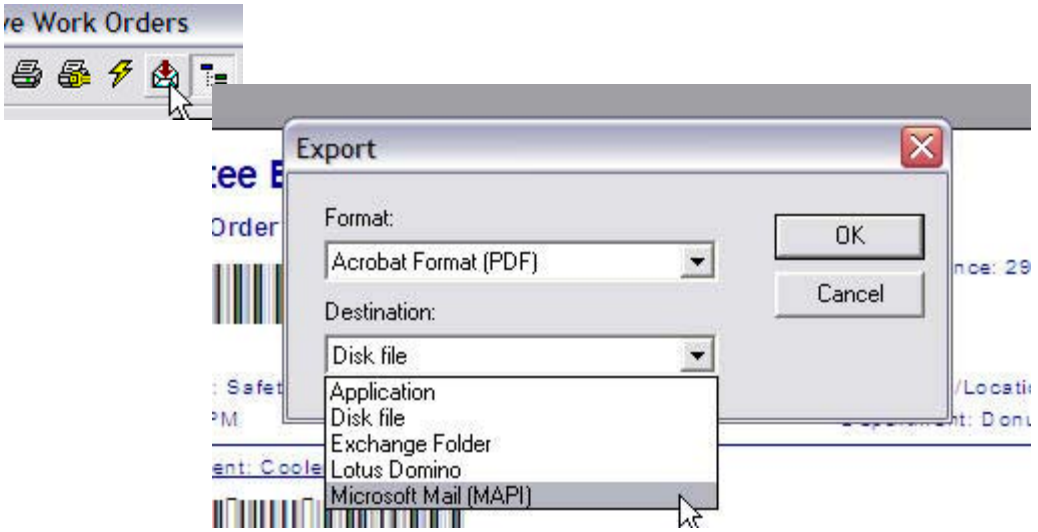
Saving/Emailing Work Orders (advanced)

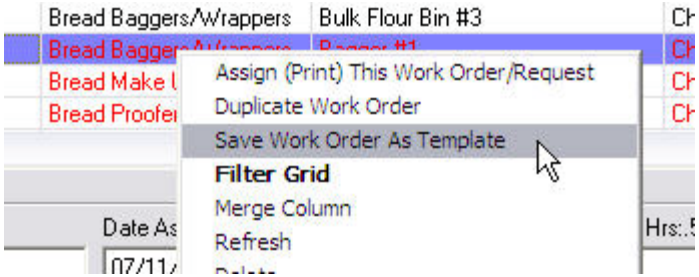
Step 1: There are several ways to save work orders. To save the entire work order grid select the menu items: File>>Save then select the saved format (HTML,, text, .csv (Excel), etc. Picture on right shows grid saved as a web page.



Step 2: In most cases you'll probably want to save individual work orders in a work order format rather than the entire grid of raw data. To save a work order select a work order by left-mouse clicking the desired row in the grid. Right mouse click the grid to display pop-up menu then select **Assign Work Order/Request**. When the work order print preview screen appears click the envelope icon at the top of the print preview screen. A pop-up screen appears giving you many options for saving or emailing this work order. Some of the formats include: Excel, HTML, MS Word, simple text, etc.



Step 3: Work orders may also be saved as "templates" or boiler-plates. A work order template is a copy of an existing work order that you can make countless copies of either directly or automatically. Once again select a grid row by clicking it. Next right mouse-click to show pop-up menu. Select the menu item **Save Work Order As Template**. A small box appears prompting you for a name for this new template. Enter a name or use the default



topic continued on next page...

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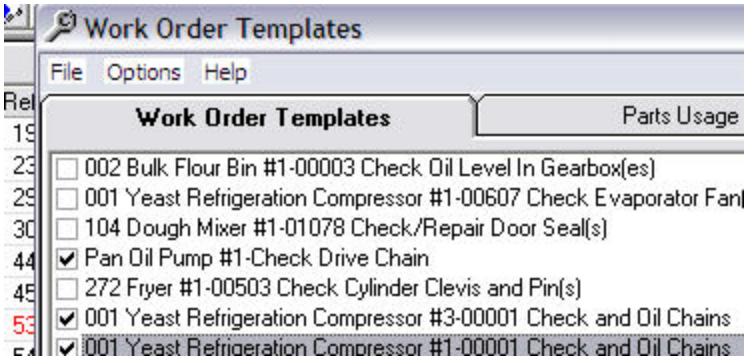
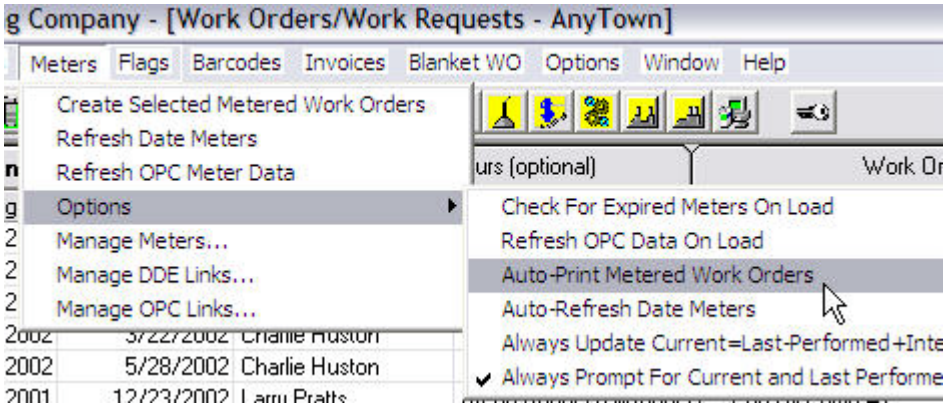
Saving/Emailing Work Orders (advanced)

Step 4: To create a work order from a template select the menu items **Templates>>Create Work Order From Template**. When the template pop-up screen appears check the template(s) you want to create work orders from then press the button labeled **Create WO**.


Work Order Templates
File
Options
Help
Work Order Templates
Parts Usage
002 Bulk Flour Bin #1-00003 Check Oil Level In Gearbox(es)
001 Yeast Refrigeration Compressor #1-00607 Check Evaporator Fan
104 Dough Mixer #1-01078 Check/Repair Door Seal(s)
Pan Oil Pump #1-Check Drive Chain
272 Fryer #1-00503 Check Cylinder Clevis and Pin(s)
001 Yeast Refrigeration Compressor #3-00001 Check and Oil Chains
001 Yeast Refrigeration Compressor #1-00001 Check and Oil Chains

Step 5: **Optional Advanced Topic** MaintSmart CMMS Software has the ability to link work order templates to "meters". Meters are are user-defined incremented values from practically any source. For example a meter could be a counter that counts saw cuts or perhaps an hour meter on an equipment item. These meters may be entered manually into MaintSmart CMMS Software through MaintSmart CMMS Software's meters section. MaintSmart CMMS Software also provides a way for you to link meters to an OPC data item. If work order templates are linked to these updated meters work orders will be created automatically from the templates should the meter reach its threshold value (user-defined). OPC is used by many common PLC and HMI network programs like RSLinx or Wonderware. Meters may be linked to PLC addresses thereby creating work orders based upon values read from actual equipment items.

Select the Meters menu item then view the various options under the Options menu



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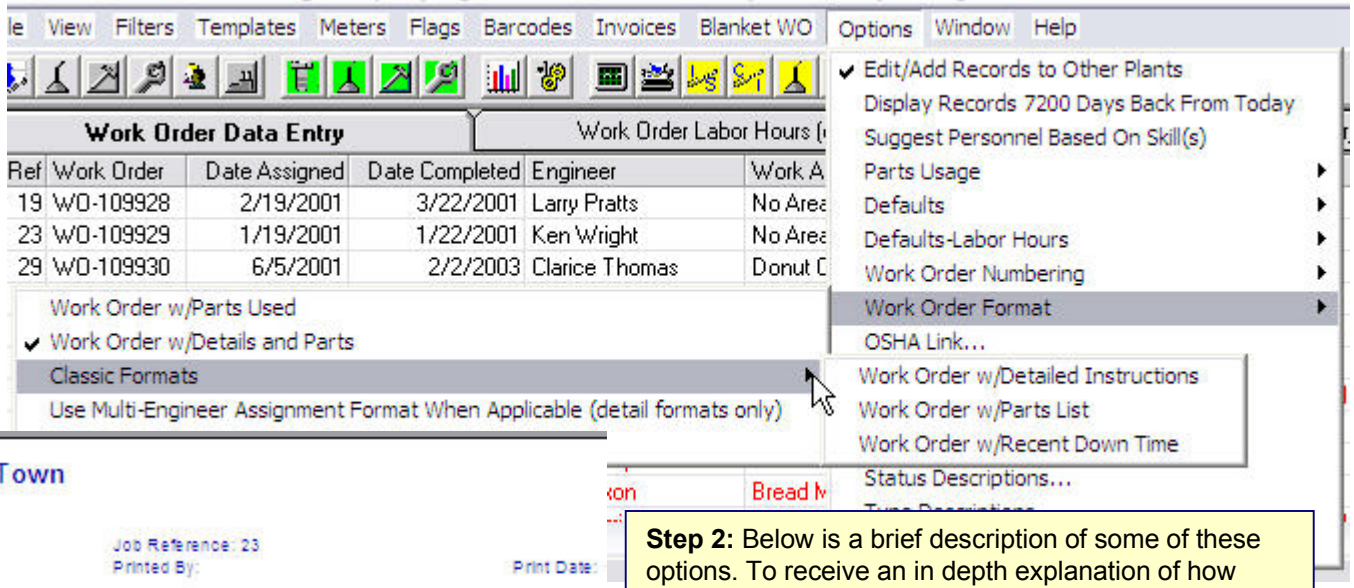
Work Order Options (advanced)

Step 1: Select the **Options** menu item. Note some of the various options available to you. Next select the **Work Order Format** menu item and check the menu item **Work Order w/Details and Parts**. Select (job ref.) #23 from the grid then assign the work order. Below is a picture of the first page of this work order.


View Filters Templates Meters Flags Barcodes Invoices Blanket WO Options Window Help
Work Order Data Entry
Work Order Labor Hours
Ref Work Order Date Assigned Date Completed Engineer
19 WO-109928 2/19/2001 3/22/2001 Larry Pratts
23 WO-109929 1/19/2001 1/22/2001 Ken Wright
29 WO-109930 6/5/2001 2/2/2003 Clarice Thomas
Work Order w/Parts Used
Work Order w/Details and Parts
Classic Formats
Use Multi-Engineer Assignment Format When Applicable (detail formats only)
Edit/Add Records to Other Plants
Display Records 7200 Days Back From Today
Suggest Personnel Based On Skill(s)
Parts Usage
Defaults
Defaults-Labor Hours
Work Order Numbering
Work Order Format
OSHA Link...
Work Order w/Detailed Instructions
Work Order w/Parts List
Work Order w/Recent Down Time
Status Descriptions...

Step 2: Below is a brief description of some of these options. To receive an in depth explanation of how each of these options work please see the MaintSmart CMMS Software User Guide.

1. **Display Records... Days Back From Today** (filter) provides a way to limit the records displayed by date.
2. Parts Usage is used for linking parts usage to work order templates. Parts may be automatically used from stock when a work order is created.
3. **Defaults - Labor Hours** refers to options and setting that may be used when adding multiple personnel to one work order. This feature also times the start and end time/date of labor hours for each person.
4. **Work Order Numbering** provides a way to either use the **Job Ref**. of the work order as the work order number or auto-increments your own numbering system.
5. **Defaults>>** provides shortcuts and more (described on the next page)

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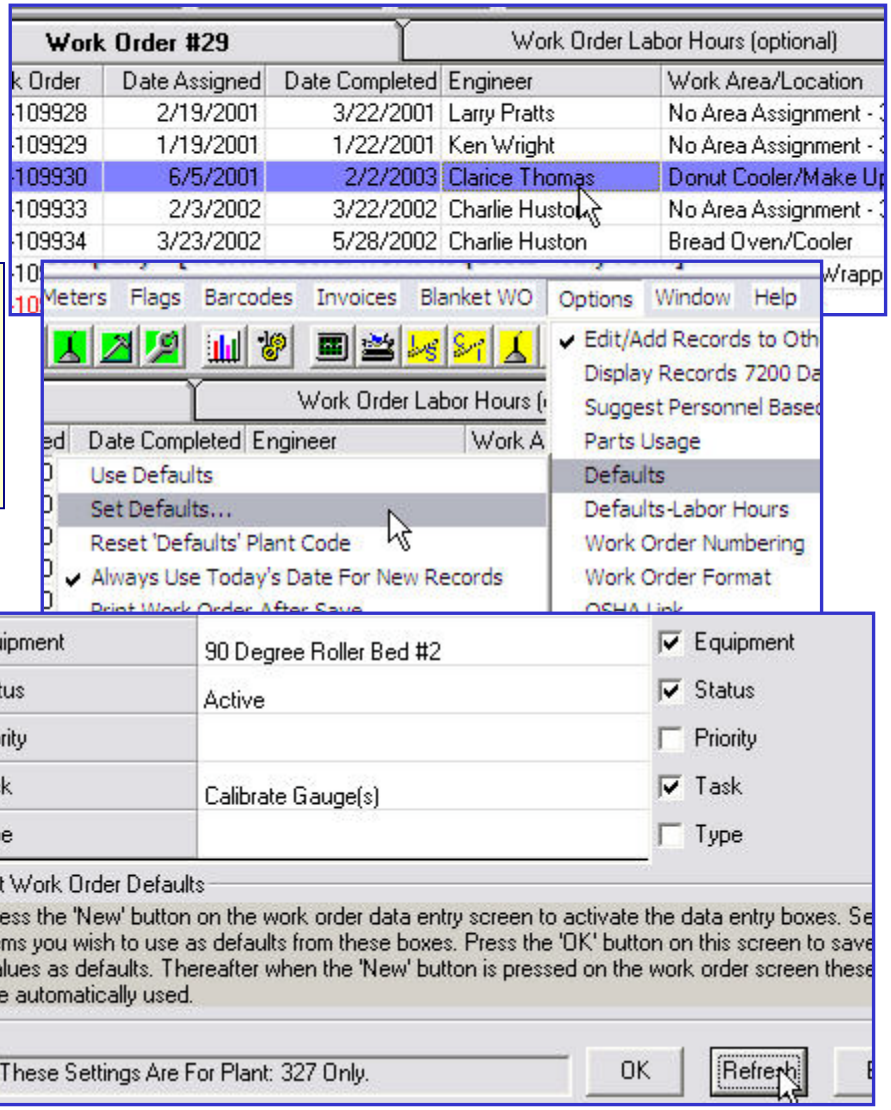
Setting Work Order Defaults (advanced)

Step 1: Work order "defaults" provide a way for MaintSmart CMMS Software to automatically fill in some or most of the data fields for you whenever you create a new work order by pressing the **New** button. To set defaults begin by pressing the **New** button. Select or type in the data values you want to use as defaults in the boxes below the grid (same as you'd do when creating a new work order).

Step 2: Select the **Options>>Defaults>>Set Defaults...** menu item. When the Set Defaults pop-up screen appears press the **Refresh** button. MaintSmart CMMS Software places all of the data selected/typed into the work order boxes into the Defaults grid. Note the checkboxes next to the grid. To include the adjacent grid data be sure the checkbox is checked. Press OK when you have the appropriate defaults selected/checked. Press the **Exit** button to close the Defaults screen. Note the message when closing.


Work Order #29
Work Order Labor Hours (optional)
k Order | Date Assigned | Date Completed | Engineer | Work Area/Location
109928 | 2/19/2001 | 3/22/2001 | Larry Pratts | No Area Assignment
109929 | 1/19/2001 | 1/22/2001 | Ken Wright | No Area Assignment
109930 | 6/5/2001 | 2/2/2003 | Clarice Thomas | Donut Cooler/Make Up
109933 | 2/3/2002 | 3/22/2002 | Charlie Huston | No Area Assignment
109934 | 3/23/2002 | 5/28/2002 | Charlie Huston | Bread Oven/Cooler
Meters Flags Barcodes Invoices Blanket WO Options Window Help
Edit/Add Records to Oth
Display Records 7200 Da
Suggest Personnel Based
Parts Usage
Defaults
Defaults-Labor Hours
Work Order Numbering
Work Order Format
Use Defaults
Set Defaults...
Reset 'Defaults' Plant Code
Always Use Today's Date For New Records
Equipment
90 Degree Roller Bed #2
Status
Active
Priority
Task
Calibrate Gauge(s)
Type
Set Work Order Defaults
Press the 'New' button on the work order data entry screen to activate the data entry boxes. Se
items you wish to use as defaults from these boxes. Press the 'OK' button on this screen to save
values as defaults. Thereafter when the 'New' button is pressed on the work order screen these
are automatically used.
These Settings Are For Plant: 327 Only.
OK
Refresh

Step 3: To enable Defaults be certain to check the menu item Use Defaults (pictured below).

Step 4: Test these new default settings by creating a new work order (press New button on work order screen). Defaults may be changed or disabled at any time as needed.

Note: MaintSmart uses data that you enter to optimize your maintenance operation through analysis and query. Be sure to view the Quick Tour: **Analyzing MaintSmart CMMS Software Data** to see how MaintSmart CMMS Software benefits you not only by archiving and reporting but also by analyzing the data you enter and providing answers that help you improve your maintenance operation.

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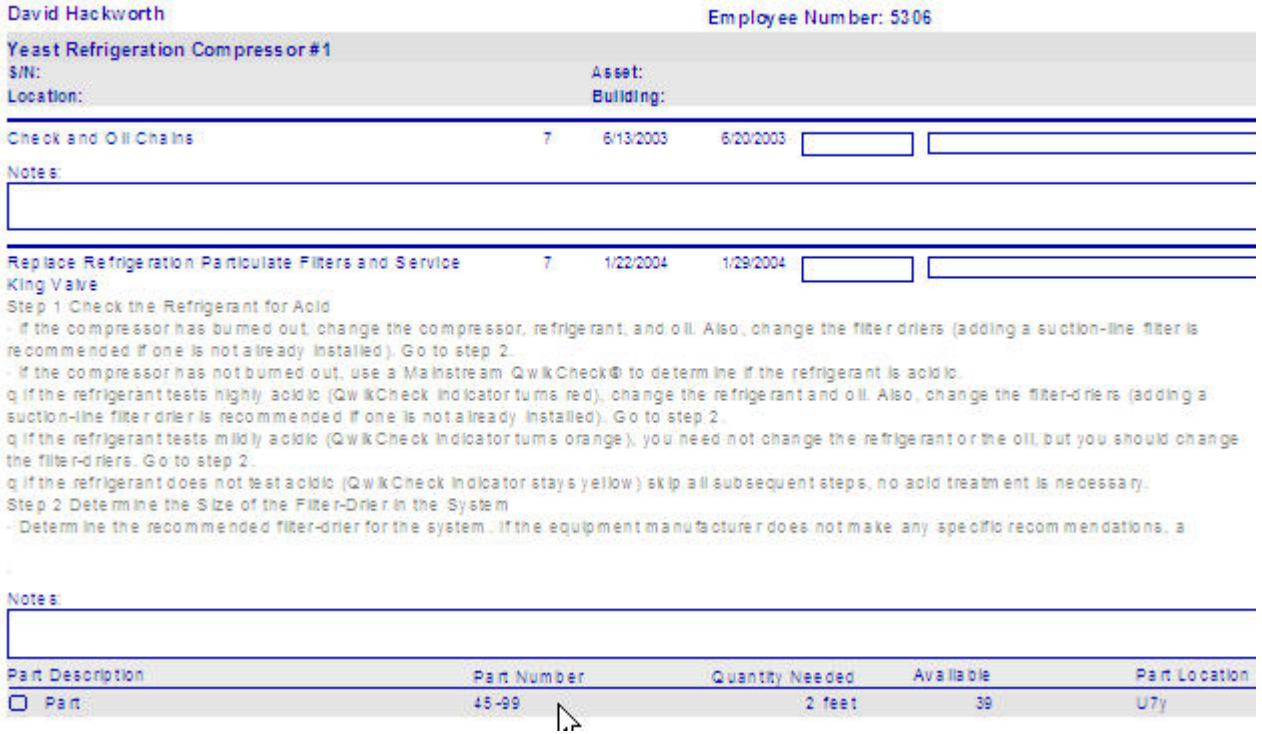
What Are PMs And How Do They Differ From Work Orders?

MaintSmart CMMS Software provides a way to handle preventive maintenance tasks (PMs) separately from the work order section of MaintSmart CMMS Software if needed: This is beneficial because when PMs are updated (validated as complete) MaintSmart CMMS Software automatically recycles them to the new **Start Date** and calculates the **Due Date** by using the completion interval (i.e. 7 days, 30 days, etc.).

Additionally PMs are listed usually with many on one sheet of paper. PMs are similar to work orders in that you may still add up to 2 GB of detailed instruction text for each equipment/task.


David Hackworth

Employee Number: 5306

Yeast Refrigeration Compressor #1

S/N: Asset:

Location: Building:

Check and Oil Chains	7	6/13/2003	6/20/2003		

Notes:

Replace Refrigeration Particulate Filters and Service King Valve	7	1/22/2004	1/29/2004		

Step 1 Check the Refrigerant for Acid

- If the compressor has burned out, change the compressor, refrigerant, and oil. Also, change the filter driers (adding a suction-line filter is recommended if one is not already installed). Go to step 2.
- If the compressor has not burned out, use a Mainstream QwikCheck® to determine if the refrigerant is acidic.

q If the refrigerant tests highly acidic (QwikCheck indicator turns red), change the refrigerant and oil. Also, change the filter-driers (adding a suction-line filter drier is recommended if one is not already installed). Go to step 2.

q If the refrigerant tests mildly acidic (QwikCheck indicator turns orange), you need not change the refrigerant or the oil, but you should change the filter-driers. Go to step 2.

q If the refrigerant does not test acidic (QwikCheck indicator stays yellow) skip all subsequent steps, no acid treatment is necessary.

Step 2 Determine the Size of the Filter-Drier in the System

- Determine the recommended filter-drier for the system. If the equipment manufacturer does not make any specific recommendations, a

Notes:

Part Description	Part Number	Quantity Needed	Available	Part Location
☐ Part	45-99	2 feet	39	U7y

PM Formats: Several PM list formats are available ranging from compact (list just task and equipment item to detailed instruction formats with required parts listings.

Filters: MaintSmart CMMS Software provides a simple way to create a filter then save the filter as a menu item. This makes it simple for an employee to simply select the menu item to print their PM list. The bottom of the PM Validation screen is devoted to filtering. Filter by date range, task, employee, equipment or work area (group of equipment items).

Printing PM Lists: Print, save as .pdf, excel, MS Word or numerous other formats. Email a PM list after saving it as a .pdf or web page. To further speed up the PM validation process MaintSmart CMMS Software provide shortcuts such as **Use Average Hours** and **Use Due Date**. If **Use Average Hours** is checked MaintSmart CMMS Software looks at the historical average time to complete the PM task for this equipment item then uses it automatically. MaintSmart CMMS Software can also assign PMs based upon an employee's skill set (advanced feature).

Remember, as with all data in MaintSmart CMMS Software, all completed PMs along with parts records and labor hours are saved for future analysis by MaintSmart CMMS Software

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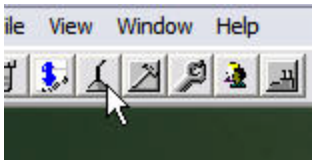
Update and Print PMs (basic)

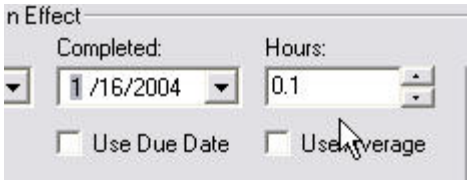
Step 1: Click the oil can icon (gray background) at the top of the screen to open the preventive maintenance (PM) validation screen.



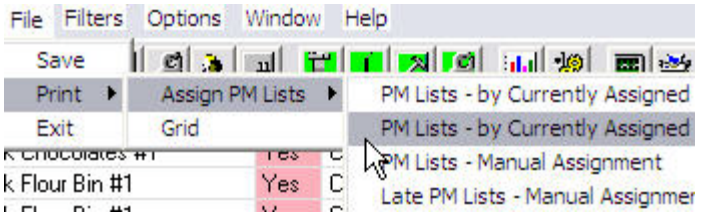
Step 2: When the PM screen appears left mouse-click the row you want to update or hold down the <CTRL> key and left click a few rows in the PM screen (or select a row the hold <SHIFT> and click another row below the first to select a block of PMs). These selected PMs are the ones you'll now update. Updating a PM simply logs the PM (equipment/task) as completed then recycled the PM to the next start date.

Yes Check Air Cylinder(s) 7
Yes Check Air Solonoid 7
Yes Check and Oil Chains 7
Yes Check Blower Oil Level 30
Yes Check Cylinder Clevis and Pin(s) 7

Step 3: Select the **Date Completed** and enter the hours (or fractional part in decimals) that it took to complete the PM. Enter any appropriate **Task Completion Comments** if needed. Press the **Save** button. All selected rows are immediately updated. The update process archives the current PMs start dates and completion dates, time to complete and who completed the actual work. Next a new record is automatically created for the next time this PM needs to be completed based upon the completion date and the interval.
Note: Task Completion Comments are comments back to you from the person who performed the PM. These comments are not recycled with the PM when it's updated but are archived for future reference. Details, unlike Comments (see **Details** button) are part of the PM and are recycled with the PM. Details may be up to 2GB per PM record and are useful for providing detailed instructions on how to perform a PM, tools needed, etc.



Step 4: To print a PM task lists select the menu items as pictured on the right. There are several different formats to choose from under the **Options>>PM List Format>>?** Menu items. Details appear only on certain formats.



Note: MaintSmart CMMS Software handles PMs separately from work orders. This provides a way to update 100s or even 1000s of PM task completions in seconds. You may create PM (type) work orders if needed too.

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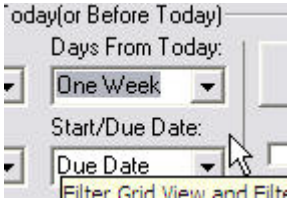
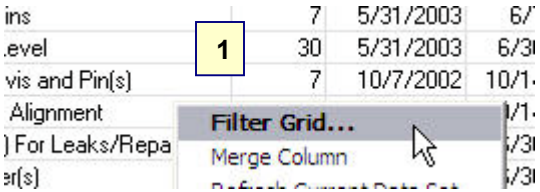
Filter and Print PMs (advanced)

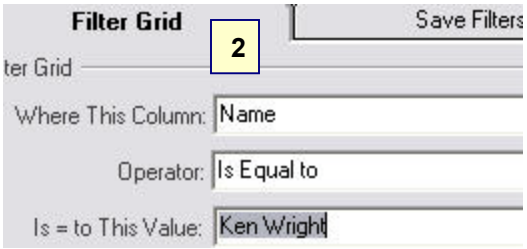


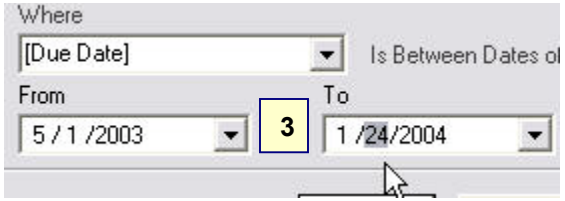
Step 1: Simple Filtering: Print a PM list from a filtered data set as follows: from the filter drop-down box labeled **technician** select the name Ken Wright. The grid now show PMs for Ken Wright only. From the **File>>Print>>Assign PM Lists** menu items notice the last entry refers to Ken Wright's PMs. Select this menu item to print Ken Wright's PMs.

Note: you can just as easily filter the PMs by Work Area, Equipment or Task too. You may also filter the PMs by how many days from today the **Start Date** or **Due Date**. Select **Due Date** from the **Start/Due Date** drop-down box. Select **One Week** from the **Days From Today** drop-down box. The PM data grid is refreshed to display PMs for ken Wright that have a **Due Date** of one week from to day and all PMs *due prior to one week from today*.

Step 2: Advanced Filtering: Right mouse-click the grid area to display the pop-up menu then select the menu item **Filter Grid** (pictured below left). From the first tab of the **Filter Grid** pop-up screen make the selections as pictured below including the date selections. Assuming today's date is 1/17/2004 this filter displays ken Wright's PMs between these dates. Go to Step 3.

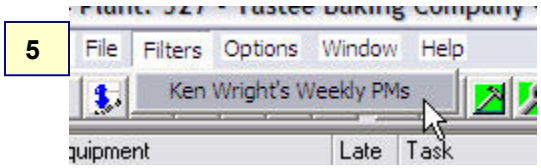






Step 3: Advanced Filtering: From the second tab on the **Filter Grid** pop-up screen and enter the text for the **Filter Name** as pictured below. The filter description is optional. Make sure the checkbox **Use Relative Date** is checked. Press **Save** and close the **Filter Grid** screen. On the main PMs screen select the menu items **Filters>>Ken Wright's Weekly PMs**. This new menu item always prints Ken Wright's PMs that are due between the date period of today to 7 days after today and 8 months(because 5/1/2003 was selected in **From:** in **Filter Grid**) before today. Now this is a powerful feature, isn't it?

Edit or Delete Filter
Filter Name:
4
Ken Wright's Weekly PMs
Filter Description (optional):
This filter creates a menu item that Ken Wright can click to get his weekly PMs (due 7 days from "today").
Use Relative Date
New
Delete
Save



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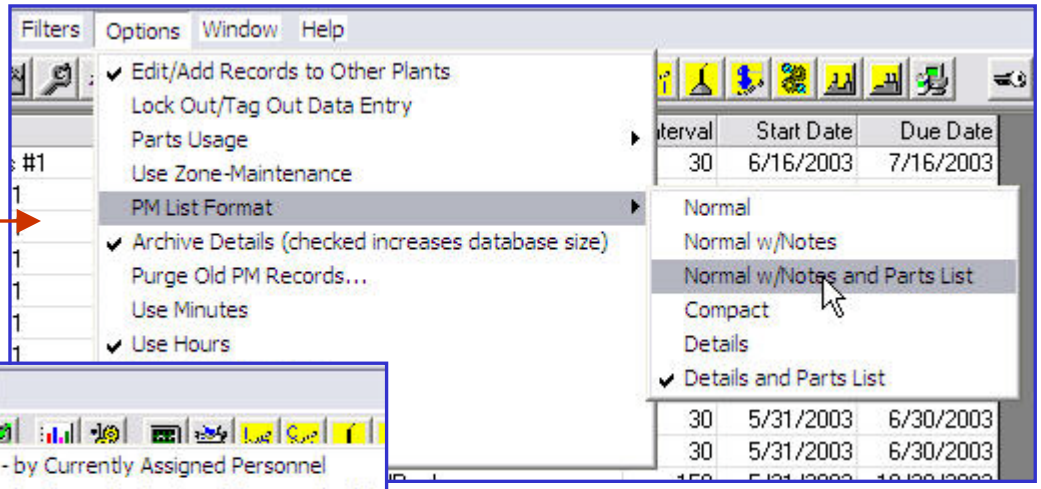
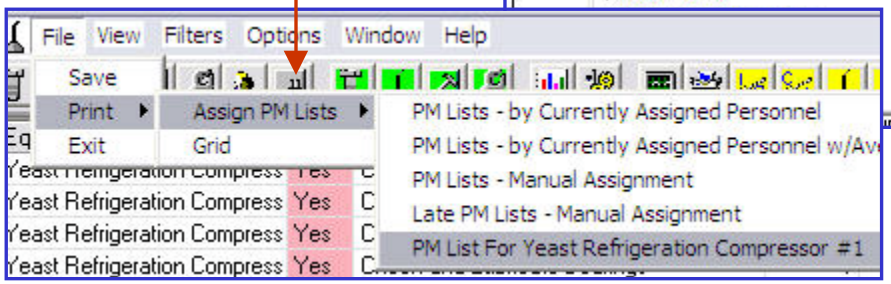
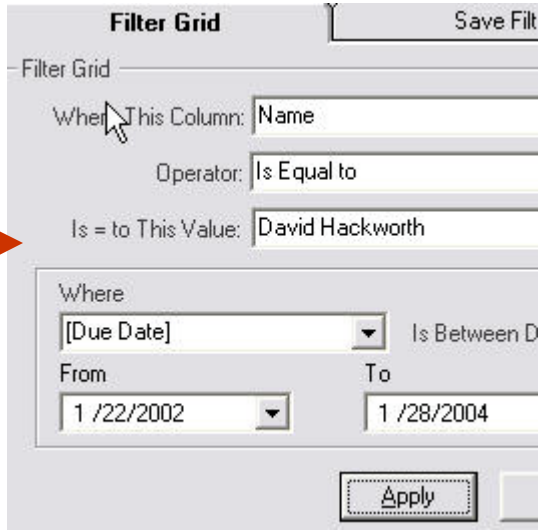
PMs Options (advanced)

Step 1: From the **Validate PM Tasks** screen select the **Options** menu item. There are 6 different PM list formats to choose from. Select the last format **Details and Parts List**. Next (near bottom of screen) select a grid filter from the drop-down box labeled **Equipment Item**. Select the "Yeast Refrigeration Compressor #1". Notice the grid now only displays PMs for this equipment item. Select the menu items as pictured below.

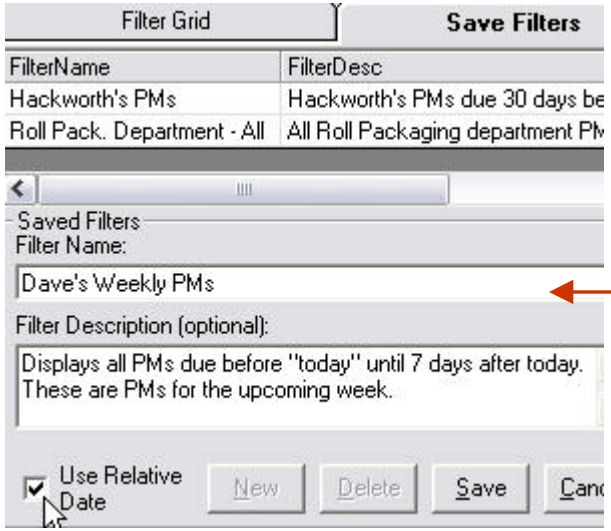




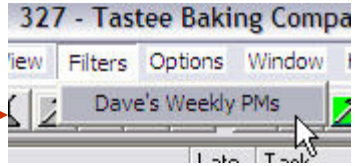
Step 2: Next right mouse-click the grid area to display the pop-up menu. Select **Filter Grid**. When the **Filter Grid** pop-up menu appears select the items as pictured on the right. Assume "today" is 1/22/2004.



Step 3: Advanced Filtering: From the second tab on the **Filter Grid** pop-up screen and enter the text for the **Filter Name** as pictured on left. The filter description is optional. Make sure the checkbox **Use Relative Date** is checked. Press save.



Step 4: Test your new filter. It is now an easily accessible menu item. This filter will always displays **Dave's Weekly PMs** that are due in the coming week.



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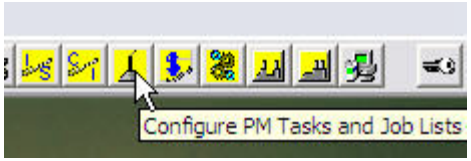
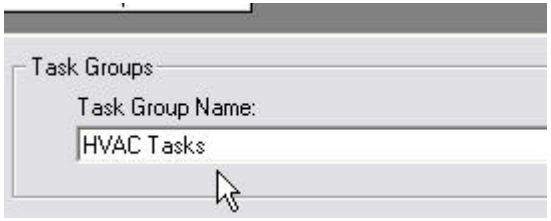
Task Groups and Task Descriptions (advanced)

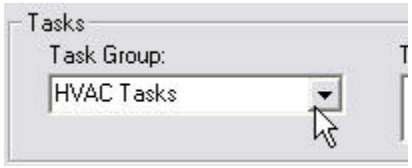
Step 1: Click the oil can icon (yellow background) at the top of the screen to open the preventive maintenance (PM) configuration screen.



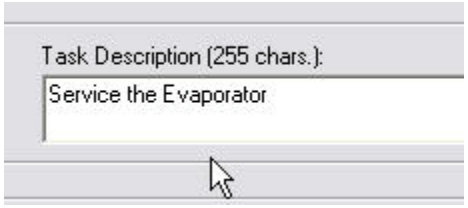
Step 2: When the PM Configuration screen appears click the first tab labeled: task Groups then click the **New** button with the left mouse button to create a new record. Enter the task group "HVAC Tasks". Press **Save** to save the new task group. This group simply represents a grouping of tasks related to HVAC preventive maintenance tasks. "Groups" are used by MaintSmart CMMS Software for filtering and organizing data items.



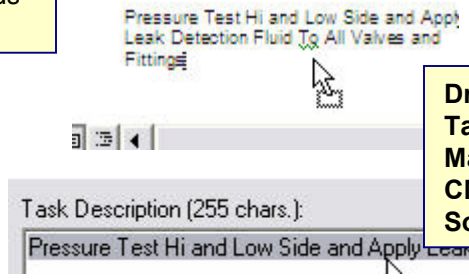
Step 3: Click the next screen tab labeled **Tasks**. From the **Task Group** drop-down select the task group that you created in the previous step (HVAC Tasks). We are going to create a new task that is related to the group: HVAC Tasks. Tasks may be easily moved from one task group to another by selecting the task in the grid (left mouse-click grid row) then changing the group selection in the drop-down below the grid.



Step 4: Type the task description: "Service the Evaporator" into the **Task Description** box. Then press **Save**.
Note: this task description is a short description up to 255 characters. You may enter a much larger task description under the **Details** button on the last tab of this screen (this is covered later in this tutorial). The reason MaintSmart CMMS Software uses a short task instruction is that later when you are analyzing your maintenance operation through one of MaintSmart CMMS Software's analysis screen the database that stores your data will be able to query the data (including task data) you've entered efficiently and deliver answers that guide you towards improvement if needed. Databases don't query from text strings longer than 255 characters.



Step 5: Press the **New** button and add another task("Pressure Test Hi and Low Side and Apply Leak Detection Fluid To All Valves and Fittings") to this task group. **Note:** You may drag and drop existing task text from another program like MS Word or copy/paste task text into MaintSmart CMMS Software's **Task Description** box.


Pressure Test Hi and Low Side and Appl
Leak Detection Fluid To All Valves and
Fittings
Task Description (255 chars.):
Pressure Test Hi and Low Side and Apply

Drag and Drop Task Text Into MaintSmart CMMS Software

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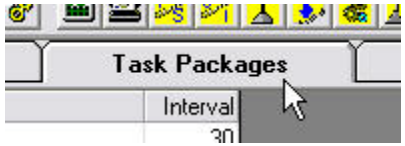
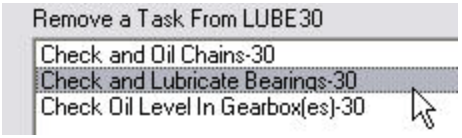
Task Packages - Speed PM Task List Creation (advanced)

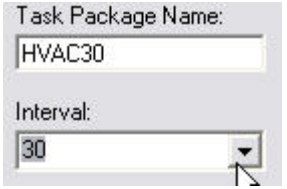
Step 1: Understand what a task package is and how it can help you set up your PM task lists. *A task package is simply a group of similar tasks that have the same completion interval.* It is important to understand that task packages are simply groups of task descriptions that may be applied to an equipment item's PM list all at the same time. Task packages are used as a shortcut for building PM lists. Their use is optional but very useful for building PM task lists quickly.

Here's an example: suppose you have a set of lubrication tasks that are commonly performed on several equipment items every 30 days. You could create a Task package called LUBE30 (name is not important) that contains three tasks related to lubrication and then set the interval for 30 days. Picture on right lists tasks. When the time comes to create the actual PM lists (**PM Lists** tab on **PM Configuration** screen) you may apply this task package to as many PM task lists as you want. Each time you apply this task package to a PM list all three of these lubrication tasks (at 30 day intervals) are added to the PM list all at once. This saves time as opposed to adding each task individually.

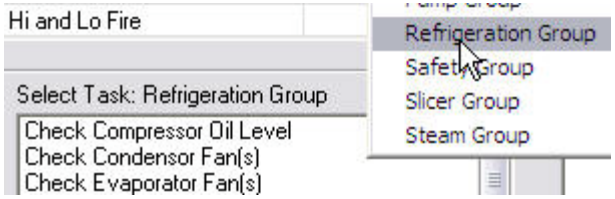




Step 2: From the third tab on the PM configuration screen labeled **Task Packages** press the **New** button to create new task package. Enter a name for the task package that identifies this task package in a way that is meaningful to you. For this example enter the name "HVAC30". This represents a task package of HVAC related tasks performed every 30 days. Select the interval of 30 from the drop-down.

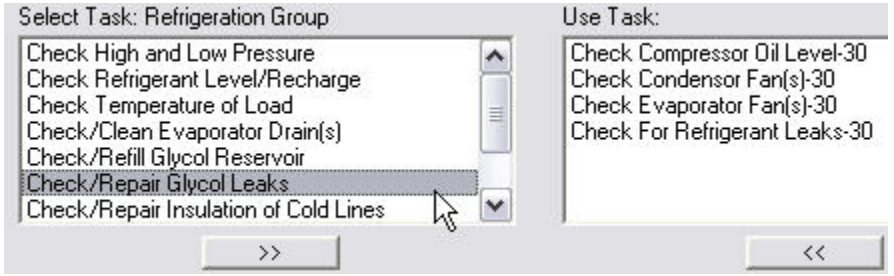


Step 3: Right mouse-click the list box labeled **Select Task**. Select from the subsequent pop-up menu the **Refrigeration Group** menu item. By doing so only tasks from the **Task Group** named **Refrigeration Group** are loaded into the list box making it easier to locate the needed tasks.



Step 4: Right mouse-click the list box labeled **Select Task**. Select from the subsequent pop-up menu the **Refrigeration Group** menu item. By doing so only tasks from the **Task Group** named **Refrigeration Group** are loaded into the list box making it easier to locate the needed tasks. Left-click the desired tasks then press the **>>** button to move the tasks to the **Use Task** list box. Press the **Save** button when you have the desired tasks in the task package.

Note: Task Packages may also be edited or deleted by left-clicking the desired row in the grid. Add/remove tasks from an existing task package with the **>>** or **<<** buttons after selection in the grid.



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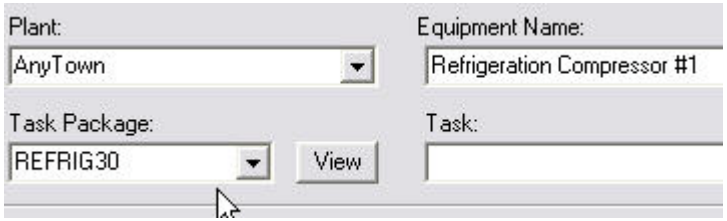
Job List Templates - Another Shortcut (advanced)

Step 1: Understand what a Job List Template is. A job list template is another shortcut that can speed up PM task list creation. Unlike a task package (similar type of tasks with same completion interval) a job list is a group of tasks that all pertain to a similar type of equipment. Job list templates contain multiple tasks with potentially different completion intervals. If you have more than one of the same type of equipment item job list templates can greatly speed up PM task list creation; and you should consider using them.

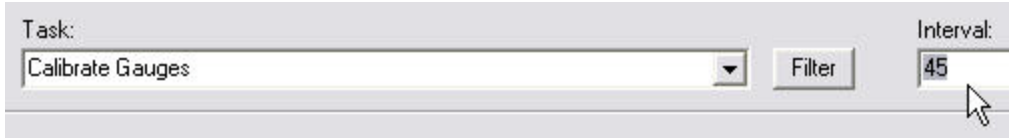
Here's an example: XYZ Apartments Service has 50 washing machines. Although these washing machines are not all the same brand they are fairly similar and for the most part require the same PM tasks. We'll create one job list template consisting of 25 PM tasks with varying completion intervals for the first washing machine.

When the time comes to build the actual PM task lists for these 50 washing machines we'll simply apply this job list template to each of the washing machine thereby applying all of the tasks in one action. By using job list templates and/or task packages you may configure comprehensive and consistent PM task lists very quickly.

Step 2: From the fourth tab on the PM configuration screen labeled **Job List Templates** press the **New** button to create a new job list template. From the **Equipment** drop-down box select the **Refrigeration Compressor #1** (or other if not available). Next select the task package REFRIG30 from the **Task Package** drop-down box. Press **Save**.



Step 3: Press **New** again to add more tasks to this job list template. This time select an individual task from the Task drop-down. Select a completion interval for this task too. Press Save. Add more tasks and/or task packages to this job list as needed.



Note: Remember task packages and job list templates are entirely optional and are not the actual PM task list you'll distribute to your maintenance personnel but rather are used to speed up PM task list creation. The next page illustrates how to create PM task list very quickly

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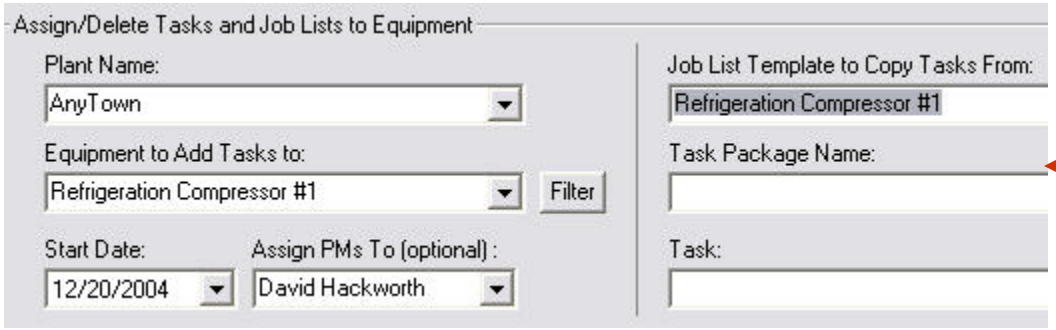
PM Task List Creation (advanced)

Step 1: Understand what a PM Task List is. A PM task list is a set of preventive maintenance tasks that describe work needed to prevent failure or prolong the life of an equipment item. MaintSmart CMMS Software uses time-based PMs in it's preventive maintenance section and uses meter-based or time based PMs in it's work order section. Create a PM task list once then the tasks recycle each time they're marked complete. You may add task package, job list templates or individual tasks at any time Delete individual tasks as needed too.

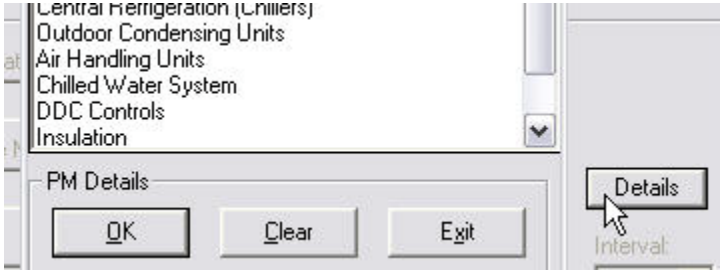
Step 2: From the fifth tab on the PM configuration screen labeled **PM Lists** press the **Edit (or Add)** button to create a new PM list or to edit an existing one. Make the selections as depicted below. Notice we are adding the job list template we created on the previous page. At first this may seem confusing that we are adding the job list template "Refrigeration Compressor #1" to the PM list for the equipment item: "Refrigeration Compressor #1" but if you think about this the job list template isn't actually a PM list but rather a set of tasks that could be applied to any equipment item. In this case we'll apply these tasks (contained by the job list) appropriately to the "Refrigeration Compressor #1". Press **Save**.

Press the **Add** (or **Edit**) button again then select the equipment item "Refrigeration Compressor #2" from the drop-down labeled **Equipment To Add Tasks To**:. Press **Save** again. Suppose you had 100 "Refrigeration Compressors". You could create consistent PM list for all 100 equipment items in a matter of minutes using these shortcuts.



Note: Add task packages or individual tasks to this PM task list too.

Step 3: You may optionally add **Details**(pictured on right) to any PM record. This is particularly useful in the case where you want to provide a tool list, check list, or detailed instructions for the task. Left mouse-click the row containing the PM record you want to add details to. Press the **Details** button. Enter up to 2 GB of text then press the **OK** button on the **Details** screen. Press **Save** on the PM screen to link these details to the PM record.



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